A Freelancer's Guide to Upwork

Get to work,
grow your business,
and do what matters to you.

upwork

Table of contents

CHAPTER 1

Introduction

1 Welcome
3 Why is Upwork right for you?
4 Who can work on Upwork?
5 How does Upwork make money?

CHAPTER 2

Getting started

7 Joining Upwork in four easy steps
8 Membership plan options
10 Building a great profile

CHAPTER 3

Finding work & submitting proposals

14 Finding the right work
16 Submitting a proposal and interviewing
20 Complete the interview

CHAPTER 4

Doing the work & getting paid

23 Managing your project
25 Upwork Payment Protection

CHAPTER 5

Finishing touches

27 Completing a contract
28 Managing your reputation and profile
31 Best Practices

TIP 1

Click the page name to jump to that page

TIP 2

Click here on any page to return to this Table of Contents

CHAPTER 1

Welcome

“

Our dream is to build a workplace for the world.

Stephane Kasriel, CEO

Why is Upwork right for you?

Great work is rewarded	You'll work with great clients and earn money. Delivering these awesome experiences will lead to even more work and more clients.
Upwork's technology makes it easy	You can use our platform to easily get set up, find more clients, control your own work, and get paid quickly and reliably.
A community focused on your succeed	As you win and succeed on projects, we'll do our best to help you find more opportunities for continued growth of your business.
Payments are protected	With Upwork Payment Protection programs, you can be more confident that you'll always be paid for work you deliver as promised.

Who can work on Upwork?

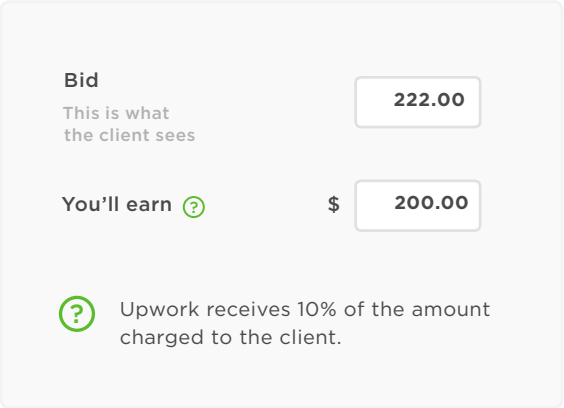
We welcome all independent professionals and agencies to join the Upwork community. Whether you're a graphic designer from the U.S., web designer from Serbia or writer from Brazil, you'll find freelance opportunities on Upwork. Depending on your business needs, we invite you to register and work in one of two ways:

Individual freelancers	For self-employed individuals and small companies that have a specific skill set and are looking to work on their own.
Agencies	For companies and freelancers that have subcontractors or employees who plan to tackle projects together on Upwork.

How does Upwork make money?

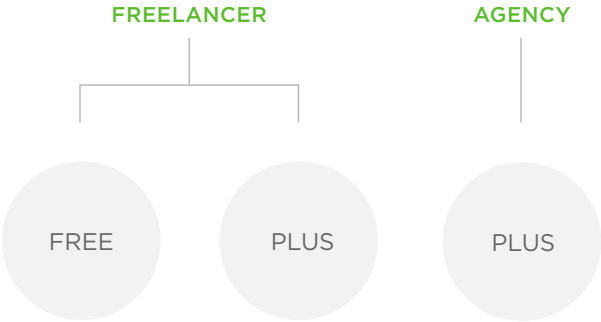
Service fees

Upwork charges a 10% service fee for each payment we process, which is generally paid by the freelancer. For example, if you agree to perform a project for $200, you'll receive $180, and Upwork will receive $20. Because of this, many freelancers choose to add a small mark-up to their bids to account for this business expense (for instance, charging $222, so that they will receive a flat $200). This fee allows us to create the latest technology and services, from matching you with ideal clients to collaborating, communicating, getting paid and payment protection.



Membership plans

All freelancers and agencies subscribe to a free or paid Upwork membership plan. Our Freelancer Basic membership is free of charge and provides all the functionality you'll need to use Upwork for your business. For those who want additional premium benefits, we offer a paid Freelancer Plus membership option. We also offer a Plus membership plan for agencies.



CHAPTER 2

Getting started

Join Upwork in four steps:

1

Sign up and select a membership plan

If you haven't signed up yet, now's the time. Pick the membership plan that best matches your needs. Remember, you can change your membership plan in the future.

2

Create your profile

Fill out as many fields as possible to create a profile that highlights your skills — elaborating on your experience and indicating your desired hourly payment rate.

3

Set up your payment option

Get ready to get paid, and tell us how you want to receive your earnings. We recommend setting up two different fund transfer methods, so that you can be paid easily.

4

Use Upwork Messages

Collaboration is made easy on Upwork when you use Messages. Organize and manage discussions, communicate in real time with your clients, and sync and share deliverables.

Membership plan options

FREELANCER BASIC	FREELANCER PLUS
60 Connects per Month*	**70 Connects per Month*** Shared across the agency
Hourly Protection For eligible hourly jobs, you're ensured payment for every hour worked	**Rollover Connects** Unused Connects automatically carry over to the following month (up to 70)
Fixed-Price Protection For fixed-price jobs, payments are secured through pre-funded milestones	**Buy Additional Connects** If you run out of Connects, you can buy more at any time ($1 per Connect)
	View Competitor Bids See the minimum, maximum, and average bid for any job
	Hourly Protection For eligible hourly jobs, you're ensured payment for every hour worked
*NOTE Connects are used to apply for jobs, with each application requiring 1 to 5 Connects (0 if you're invited or rehired)	**Fixed-Price Protection** For fixed-price jobs, payments are secured through pre-funded milestones

Freelancer Basic membership (Free)
This includes a complete Upwork profile, 60 Connects per monthly billing cycle, unlimited invitations to projects, and Payment Protection.

Freelancer Plus membership ($10 per month)
Includes everything in the Freelancer Basic membership plan, including Upwork Payment Protection, plus 10 additional Connects per month (for a total of 70), the ability to roll over up to 70 unused Connects to the following monthly billing cycle, freedom to buy extra Connects, and visibility into what others are bidding on the contract.

Membership plan options

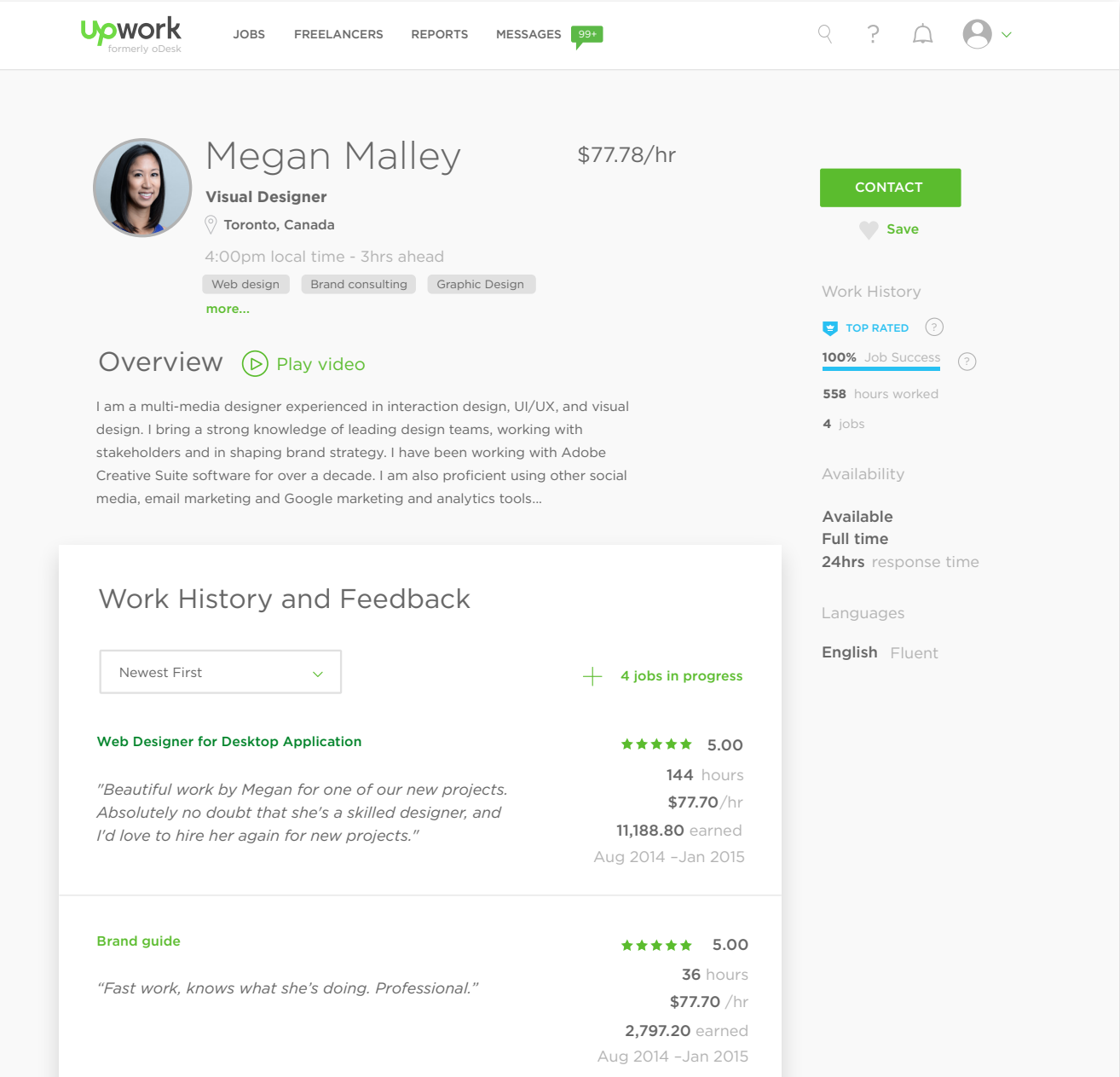
AGENCY PLUS
Multi-Person Teams Add and support unlimited teams and team members
80 Connects per Month* Shared across the agency
Rollover Connects Unused Connects automatically carry over to the following month (up to 80)
Buy Additional Connects If you run out of Connects, you can buy more at any time ($1 per Connect)
View Competitor Bids See the minimum, maximum, and average bid for any job
Hourly Protection For eligible hourly jobs, you're ensured payment for every hour worked
Fixed-Price Protection For fixed-price jobs, payments are secured through pre-funded milestones
***NOTE** Connects are used to apply for jobs, with each application requiring 1 to 5 Connects (0 if you're invited or rehired)

Agency Plus membership ($20 per month)
Designed for agencies with team members on their Upwork account. In addition to a company logo and company name, this plan allows an agency owner to add unlimited team members and share Connects among their team. It also includes 80 Connects per month, the ability to roll over up to 80 unused Connects to the following month, freedom to buy extra Connects, visibility into other bidders on contracts, unlimited invitations to projects, and Payment Protection.

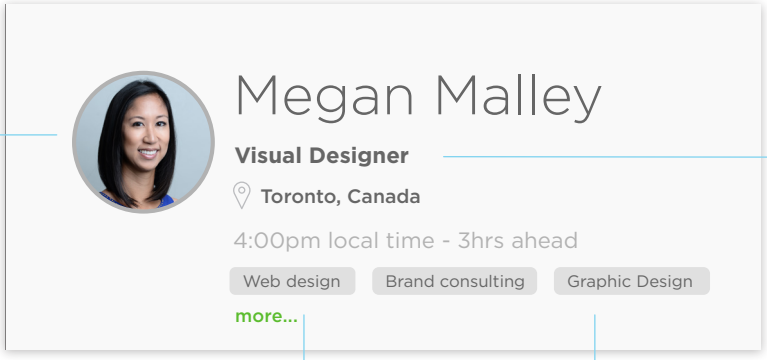
Building a great profile

Successful profiles are complete, accurate, and paint a compelling picture of your skills, services and accomplishments. Your profile is an opportunity to advertise your freelance business to potential clients, and you can complete it as needed.

Here are some thoughts on how you can make a great first impression.



Building a great profile



Professional Picture

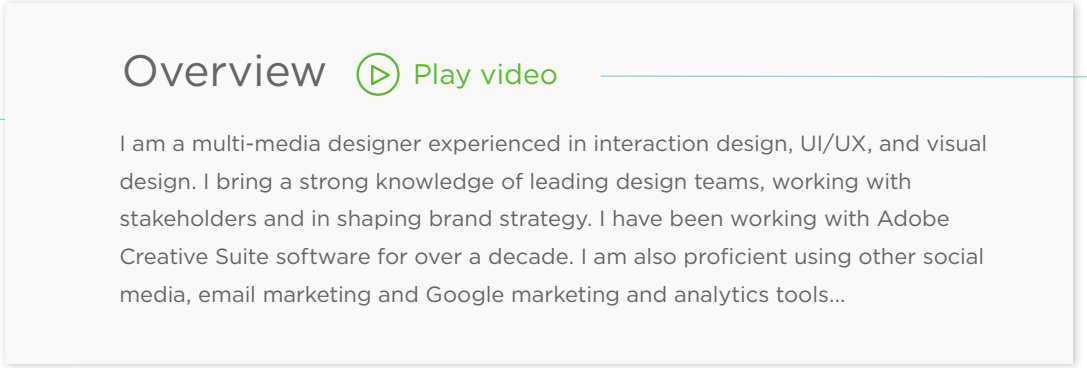
- Headshot image of yourself
- Friendly expression
- Plain background
- Business casual attire

Targeted Skills

- Pick 4-6 skills
- Put your best skills at the top
- Take Skills Tests

Accurate Title

- Reflects personal experience
- Indicates preferred jobs
- Short and impactful



Compelling Overview

- Use complete sentences
- No bullet points
- Describe your business and the services you offer
- Highlight your preferred work
- Include past professional achievements

Introduction Video

- Add a one minute video about you and your skills
- Let clients see your personality
- Explain to clients the services you offer

Insider Tips

Profiles will not be visible on Upwork until they are completed and verified.

Building a great profile

Employment History

Creative Director Huge, Inc.
December 2013 - March 2014

Managed a team at an award-winning interactive agency that provides innovative digital solutions creating graphical interfaces, from concept to final product, and work closely with User Experience designers and Developers...

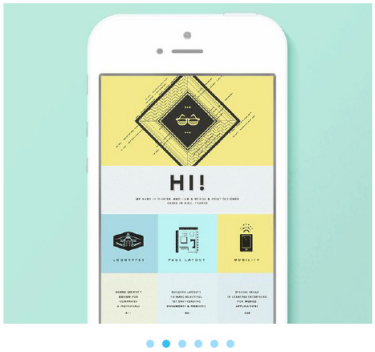
Education

M.A. in Art, emphasis in Graphic Design. Minor in Advertising. University of California
December 2009 - March 2011

Relevant Coursework Introduction to Media, Consumer Advertising, 3-D Design, Beginning Drawing, 2-D Design, Introduction to Marketing, Media buying, Integrated Marketing Communications, Advertising Campaigns, Advertising Layout, Photography.

Complete Education & Employment History

- Add your most recent education
- Highlight accomplishments, professional certifications and licenses, special recognition or awards
- Include employment history



All Task Mobile App July 2015

$2,500 (100 hrs @ $25/ hr)

All Task is the premier mobile community and networking platform for India's entrepreneurs and startups.

WHAT I DID

- Managed mobile community and networking team
- Lead development team and help weekly check-ins

iOS Android JQuery CSS

CLIENT FEEDBACK

★★★★★

Ashley has built a strong (and deserved) reputation as someone with vision, diligence and honour – someone who gets things done! I have no hesitation in recommending her and know that she will always give of his best in any endeavour.

– Angus Young

Google play App Store

Visual Portfolio

- Add past work samples
- Secure permission from past clients

Other profile areas

Professional Certifications: Add professional certifications.

Skills tests: Take a few tests to show potential clients that you can have the skills to do the job.

Linking External Accounts: Link external accounts to your Upwork profile to show your online presence.

CHAPTER 3

Finding work & submitting proposals

Finding the right project

Searching for projects (and setting up your job feed) is easy. It's also an important part of becoming an active and engaged member of Upwork. This helps ensure that you never miss out on projects you're a great fit for.

1

Pick a skill

Enter a skill (or two) into the search bar to find projects that match your talents.

2

Set filters

Use filters on the left-hand side of the **Search Results Page** to find a more-targeted list.

3

Add to Job Feed

After setting your search preferences, add it to your **Job Feed** so you can have an ongoing, updated list of new projects that match your preferences.

Fixed-price vs. hourly projects

On Upwork there are two types of contracts.
Here's how they compare.

Hourly

On hourly contracts you're paid by the hour, making this a preferred option when your project requires flexibility. Examples of projects that can work well on an hourly basis include Customer Service and Technical Support.

Hourly contract payments are protected by Hourly Payment Protection. Here's how:

1. Agree to the number of authorized hours with your client via the offer details page.
2. Install and track all your project time using the Upwork Team App.
3. Add descriptions and notes of your work to your time log.
4. Quickly communicate with your client, and request approval for, any changes needed to your authorized hours.

Fixed-Price

On fixed-price contracts you're paid a fixed amount for a project deliverable, or set of deliverables. This option is ideal when the work is more clearly defined. Examples of projects well suited for fixed-price contracts include Web Design and Mobile App Development.

Fixed-price contracts are protected by Fixed-Price Payment Protection. Here's how:

1. Agree to one or more project milestones with your client — clearly outlining what you'll deliver, when you'll deliver it, and for how much.
2. Before starting any work on the project, wait until a milestone is funded and the money is held in escrow.
3. Submit your work through the Upwork platform.
4. Make sure you've been paid for a milestone, and that the next one is funded, before continuing work.

Tips for a succesful contract

Regardless of which type of contract you and your client agree to, make sure you always:

- Agree to final payment terms (hours, deliverables and costs) on the contract offers page.
- Confirm that your client has a verified payment method on file.
- Always deliver work through the Upwork platform.
- Only receive payments through your Upwork account.

Submitting a proposal and interviewing

Now that you're ready to submit proposals to clients, here's how the process works:

1. Find a project you like and press the "Submit a Proposal" button.
2. Review the number of Connects required to submit a proposal, and your Connects balance.
3. Read below for tips on writing a winning Proposal.
4. Enter your offered rate, write a cover letter, add attachments (if any), and send the proposal.
5. The client will review proposals and contact freelancers for interviews.
6. The client may propose a paid "test project" to get a better idea of your skills. This is a great way to find out how well you'll work together. Just be sure to agree upon pricing terms before you begin. There are no free test projects on Upwork. This is a violation of our policy.
7. After everything is discussed, the client will send you an offer. Review it, accept it and start working.

What are Connects?

Connects are tokens you use to submit applications. If the client invites you to apply or is rehiring you, you won't need to use any Connects. All other applications require anywhere from 1 to 5 Connects, depending on factors such as the size and type of job.

Each Upwork membership plan comes with a Connects budget. For individual freelancers, the **Freelancer Basic** plan comes with 60 Connects per month, while the **Freelancer Plus** plan includes 70 (with the ability to purchase more and roll over unused Connects to the following month). For agencies, the **Agency Basic** plan has 60 Connects per month, while the **Agency Plus** plan comes with 80 Connects per month. Your monthly Connects budget is replenished at the beginning of your billing cycle.

Tips for writing a winning proposal

You can make a strong first impression with your proposal. Introduce yourself, highlight your skills and experience, and tell the client why they should award you the project. It's your opportunity to show that you understand the project and are qualified for the project.

Here are ideas to write a stellar proposal that works well with clients and leads to interviews:

Be specific
Keep it short and to the point. Briefly tell the client about your relevant skills and experience. Showcase specific examples of your experience related to the client's projects.

Get answers up front
Ask clarifying questions about the project. You'll show your understanding and demonstrate the value you'll bring to the project.

Provide requested information
Some clients might ask you to answer a specific question, or to include a keyword in your cover letter. This helps them filter out generic, "copy and paste" proposals. Look for these directions and follow them.

Proofread, edit, and deliver
Did you address all the criteria and answer the client's questions? Have you added relevant links to samples of your work? Do a final grammar and spelling check before you hit "Send."

Don't Spam

Don't send a generic "cut and paste" proposal. It hurts your chance of being awarded the project and can reflect poorly on your Upwork reputation. It's okay to adapt an old cover letter, but make it relevant to the project you're trying to win.

Suggest a price

On Upwork, freelancers always set and negotiate their own rates. You can even set a different fixed or hourly rate for each proposal you submit. Just change the default rate in the proposal before you hit the “Send” button.

To decide your price for fixed-price contracts, some freelancers find it makes sense to start with an estimate of how long it will take to finish.

Here’s one way to do it:

Break the job into phases
For instance, building a website may include five of them: planning, design, development, review, and testing.

Calculate your charge
For each phase, calculate your charge by estimating the time it will take to complete, including revisions.

Add it all up
Add up the estimated cost of all phases (plus a little extra to account for unexpected issues).

Consider profit vs. risk
In deciding on a final amount, consider any additional profit desired or risks that you might take on.

Submit and carry on

Once you've submitted your proposal, you may receive a notification that the client would like to set up an interview (or maybe even engage with you immediately). In some cases you may not hear anything back at all.

Clients are not required to respond to all proposals, so keep your options open by also submitting proposals to other projects.

What is circumvention?

Circumvention is when you accept a client's payment outside of the Upwork platform during the exclusivity period specified in the Upwork User Agreement. Doing so, or suggesting this to your client, is a violation of the User Agreement and can result in your account being placed on hold. If a client asks you to start work without creating a contract on Upwork, beware! You won't be protected by Upwork Payment Protection, and Upwork can't ensure you'll get paid.

Just remember: Work on Upwork, get paid on Upwork.

Complete the interview

If the client requests an interview, reply quickly with your availability and find a meeting time that works for you both. This will increase your chances of winning the project. If your potential client is in a different time zone, be prepared to interview at a time that is outside the traditional 9-to-5 window.

Interviews can be text-based through Upwork Messages or Skype, or over the phone. So agree to a method that works best for both of you. Make sure you understand how the interview will be conducted (for example, voice vs. Upwork Messages text), so you can prepare in advance.

Here's some tips to make the most of your interview:

Be flexible
Time zones and communication preferences vary with each client. Be willing to adapt to the client's time and interview requirements.

Do your homework
Research your client and their project, so you can have a meaningful conversation about their business. Before starting, write down a few project-specific questions.

Be professional
Talk about your accomplishments, and ask questions about the engagement, in a way that is respectful and polite.

Be honest
If you don't know the answer to a question (or don't like the answer you have to give), be honest. Misleading a client will lead to a bad experience for everyone.

End on a positive note
Ask if there is a deadline for hiring, so you'll know when the client will make a decision. Also, don't forget to thank them for considering your proposal.

After the interview:

Provide additional info
If you promised to send some extra details or a link to a portfolio piece during the interview, do so promptly. It's easier to do it right after the conversation.

Always follow up
Send a short note and reiterate on the agreements made during the conversation (if there are any).

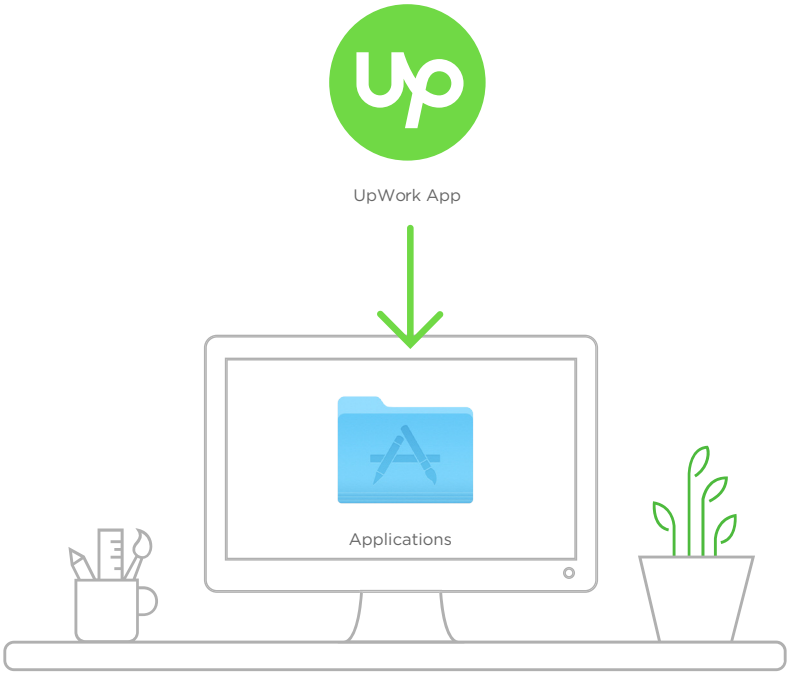
CHAPTER 4

Doing the work & getting paid

Starting the project with a kickoff

You control how you get the work done, and your clients will rely on your expertise to get started. Before you start working, consider setting up a kickoff meeting or writing a message to your client. Another popular action is to establish a client communication plan that details how often you'll report on progress. You can communicate with your client through Upwork Messages, email, or chat — but choose one method and stick with it to avoid confusion.

Managing and delivering work hourly contracts



Using the Team App

If you're starting an hourly contract, you'll want to download the Team App to log hours and get paid for your time.

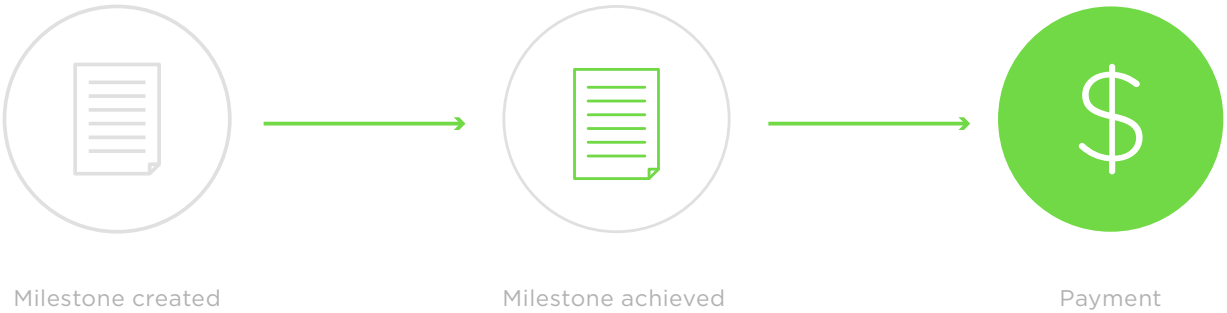
The Work Diary feature of the Team App helps you track your time and takes work-in-progress snapshots at random times in 10-minute intervals. These snapshots reassure your online clients that you have worked all the hours billed to them through Upwork and helps ensure you'll be paid, even if a dispute arises. (You can always delete any snapshots you don't want shared and billed to your client.)

Your client may set a maximum number of hours you can log in one week. Know your limit and tell your client when you're getting close to it. This allows them to decide whether to increase the limit or wait until next week to continue.

When the week is over, you and your client have a chance to review your timelogs before they are finalized and payment is processed.

The billing cycle ends every Sunday, and your earnings become available 10 days later.

Managing and delivering work
Fixed-price contracts



Escrow and milestone-based payments

For fixed-price contracts, you and your clients will create a list of milestones. The client will prefund each milestone with escrow, and the money will be visibly held on the Upwork platform. When you've completed the work for a milestone, it's a good idea to let your client know and submit your work to them on Upwork. If they're satisfied with the work, the funds will be released to your account, and you'll follow the same sequence for the next milestone.

If your client is not satisfied with the services, you will have to communicate directly and discuss adjusting the terms of the deliverable in order to find a mutual understanding and get paid.

If, however, there's no way to come to a consensus, either you or your client can reach out to Upwork for free dispute assistance. In this case, we will schedule and moderate a discussion, so that you can come to a mutually agreeable resolution regarding the release of funds held in escrow.

Trust & safety
Upwork payment protection

Every hourly contract using the Team App is eligible for Upwork Hourly Protection to give you confidence that an hour worked is an hour paid.

Every fixed-price contract managed with escrow and milestones is protected by Upwork Fixed-Price Protection. Just set up your contract terms, manage the work and payments on Upwork, and you can have confidence you'll get paid.

CHAPTER 5

Finishing touches

Completing a Contract

Your contract is complete after you've delivered the final product or the number of hours needed by your client has finished. Send an email to notify your client and let them know you're available if they have questions or concerns.

If your contract remains open, your client may still be reviewing your work. But because you receive final feedback only after the job is closed, feel free to ask them to close the contract once the work is reviewed and paid for.

Managing your reputation and profile

Once you complete a contract, your client has the opportunity to rate your work from 1 to 5 stars with final feedback. They can also provide you with a private recommendation rating, and leave a note about their experience. These are optional for the client to leave, but most do as it is an important method for evaluating their experience. The most important things you can do to receive good final ratings is delivering quality work, communicating early and often with your clients, and being an overall pleasure to work with.

Pay attention to your Job Success Score

Your Job Success score is a comprehensive, single measure of your work and reputation on Upwork. Talented freelancers who deliver high quality work to their clients find that the Job Success score helps them promote their freelance business in the Upwork marketplace and win new clients and contracts.

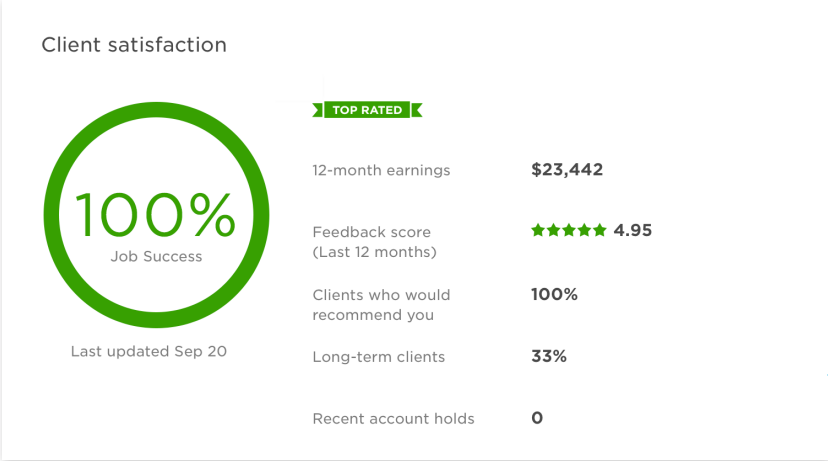
Refresh your profile:

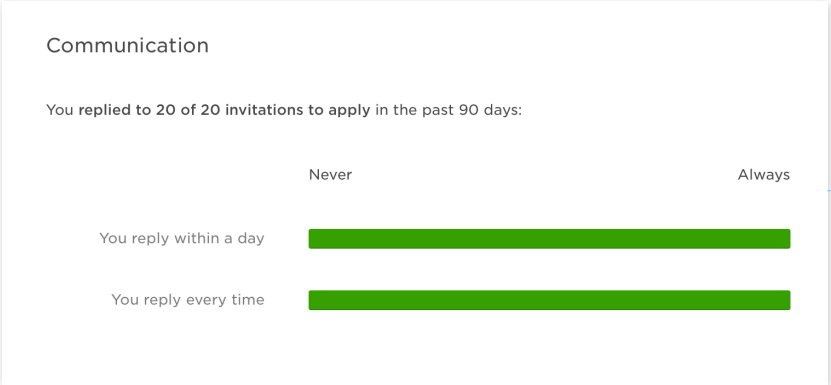
Update your portfolio once a project is done, adding an image or link to the final product, if it's permitted by the client.

Learned something new?
Add it to your overview and skills list.
And if you've strengthened a skill, retake the relevant test on Upwork or mention that skill more prominently.

Have a great testimonial from a client?
Perfect; add that too.

Managing your reputation and profile





Track your stats:

You can carefully oversee all the factors that comprise your Upwork reputation on your My Stats page.

This page covers three sections:

Client Satisfaction
Illustrates your overall reputation on the platform.

Communication
Shows your client responsiveness.

Marketing Effectiveness
Tracks your productiveness on bidding and winning projects, while also showing profile page views.

Strive to be the best: Our Top Rated program and Rising Talent program

Top Rated Program

The Top Rated program recognizes freelancers who consistently deliver high-quality work to their clients.

The program provides Top Rated Upwork freelancers with perks that may include:

- A Top Rated badge to help your Upwork profile stand out
- Invitations to submit proposals for premier projects
- Priority phone, chat, and email support

How do you qualify?

By consistently delivering great experiences for your clients on Upwork. Here are more details on what it takes to become Top Rated:

- A Job Success score of at least 90%
- 12-month earnings of at least $1,000 through Upwork
- An account in good standing with no recent account holds
- A 100% complete profile with photo
- Up to date availability (if unavailable now, set a date estimate)
- At least 30 days of work history on Upwork.

Rising Talent Program

The Rising Talent program provides an added benefit to freelancers with strong backgrounds in their fields, who are new on Upwork.

The program provides:

- A Rising Talent badge on your profile
- Specialized customer support team
- Personalized profile tips to help you stand out

How do you qualify?

Always comply with the Upwork Terms of Service and deliver great work!

- A 100% complete Upwork profile
- Up-to-date availability status
- Regularly submit proposals to projects relevant in your skill set
- Deliver great work to your clients and receive great feedback
- Complete your projects on time and as promised

BadgeUp

Once you have enough work history to earn a great Job Success score, you'll no longer be eligible for the Rising Talent program. But you can then start working toward Top Rated status!

Best practices

How you run your business is completely up to you, but here are some practices from successful freelancers which you may want to consider.

Communicate early, communicate often

Be proactive—clients usually get concerned when they don't hear from a freelancer.

When in doubt, ask

This will help clear up confusion, save time, and keep the engagement running smoothly.

Set clear expectations

Provide honest and realistic project updates and quickly alert your client when you encounter a problem.

Respect deadlines

Deliver your work on time, every time. If you think you'll miss a deadline, let your client know so they can plan accordingly.

Be a pleasure to work with

Listen to your client's concerns and respond with a positive attitude. Developing a rapport can make for a great work experience for both parties.

Under-promise, over-deliver

Never promise more than you can deliver and consider giving a little extra to every project.